## Family Office/Client Relations – Client Relations Specialist

The Client Relations Specialist will assist the Senior Director and Client Relations Manager with the provision of services related to banking, insurance, charitable giving, reporting and analysis and other client relations activities.

**DUTIES:**

- Support the Client Relations team in responding to daily, often high-volume client requests requiring exceptional responsiveness and attention to detail.
- Review client-related invoices, facilitate client approval, and coordinate/track payments by the accounting team.
- Perform Administrative duties for family.
- Assist in providing banking services, including credit card applications and other banking needs.
- Assist with providing hands-on transactional support for clients' real estate and other significant transactions by working through established relationships with bankers, realtors, attorneys, escrow officers, mortgage brokers, insurance brokers and contractors; review various contracts, agreements and leases.
- Assist clients with establishing utility and other accounts with various third party service vendors.
- Assist with arranging background checks for the clients' potential domestic employees, establishing payroll and medical/dental insurance coverage.
- Assist in managing insurance policies for the clients' property and casualty insurance program.
- Monitor client credit reports for unusual activity and follow up on such items promptly.
- Assist in the preparation of schedules and documents for the Foundations. Track donation activity, draft gifting letters, and prepare quarterly investment performance reports.
- Assist with monitoring political contribution filings for clients and ensure that clients are in compliance with federal and state laws.
- Use client's financial and investment data to prepare various schedules and analyses for management to facilitate decision-making. Coordinate with various departments, including accounting and tax teams, to gather information needed.
- Review reports prepared by accounting staff prior to the distribution to clients.
- Utilize Salesforce to manage and maintain client information.
- Draft letters and memos for the Senior Director on as needed basis.
- Develop and document policies and procedures for handling client requests.
- Assist Senior Director and Client Relations Manager with other projects and tasks as requested.

**QUALIFICATIONS:**

- Minimum BA/BS with a preference for an emphasis in coursework in Finance, Business, or Accounting.
- Minimum 2 years of experience in the Financial Services industry or in a Family Office environment or a recent college graduate with relevant internships.
- Fluency with the MS Office Suite, including strong MS Excel skills.
- Experience with Salesforce or other contact management (CRM) tools a plus.
- Ability to read, analyze and interpret financial reports and legal documents.

- **If you have a background in Tax – it would be a PLUS and highly desired.**
- Must be client-focused and able to research and respond to inquiries or questions from clients in a thorough and highly professional manner.
- Must be detail-oriented and possess strong organizational skills.
- Independent judgement to solve complex problems, triage competing priorities, and carry out assigned responsibilities.
- Natural inclination toward process improvement, controls, and standardization of processes. Ability to use judgement to consistently look for any ways to improve processes, and comfortable with providing recommendations for improvement.
- Ability to maintain strict client confidentiality.
- Must have strong interpersonal skills evidenced in both verbal and written communications, as well as excellent listening skills.
- Possess strong collaboration skills and enjoy working as a part of team to provide the highest quality of service.
- Comfort with and strong inclination to reach out and follow-up on inquiries with internal and external contacts, as well as respond promptly to inquiries from others within the department and externally.
- Ability to define problem, collect data, establish facts, and draw valid conclusions.
- Ability to extrapolate previous scenarios or experiences and apply to current and new situations.
- Ability to think ahead and plan proactively.

SEND RESUME AS AN MS WORD ATTACHMENT TO diane@dmstone.com